

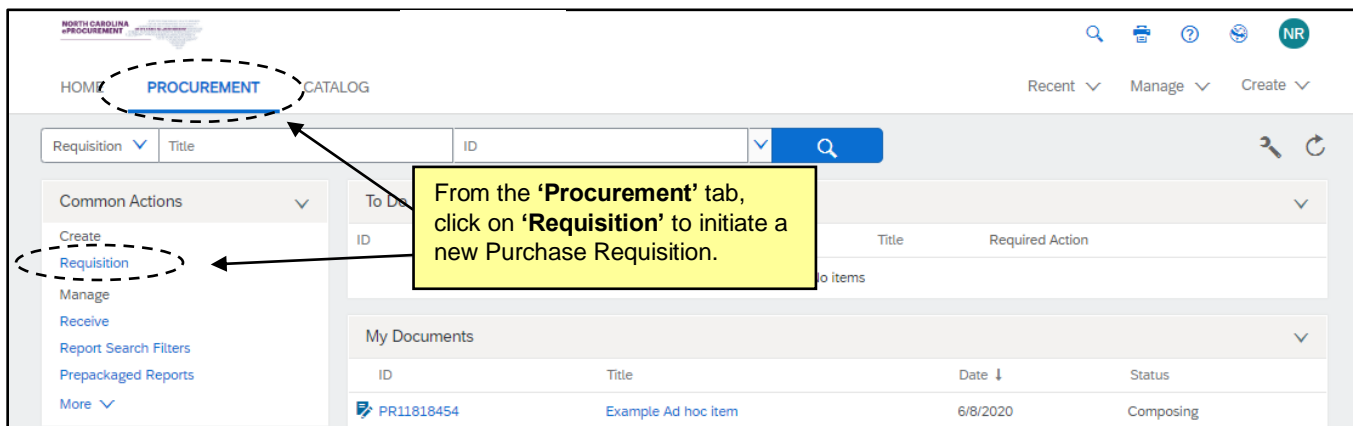
NC eProcurement

Creating Purchase Requisitions: Expert View

This process guide provides instruction on the functional steps to create a Purchase Requisition (PR) in the Expert View of NC eProcurement. A PR is a request to buy goods or services that is created electronically using the Ariba on Demand purchasing system.

I. Creating a Purchase Requisition with Catalog Items

There are two ways to create a Purchase Requisition (PR) in Expert View. From the **'Procurement'** tab, the user can click the **'Requisition'** link at the top of the **'Common Actions'** portlet, or from the **'Catalog'** tab, the user can search for and select an item and click **'Add to cart.'** Both actions will generate a numbered but untitled PR to which the user can add more items, **'Check out'** those items, and **'Submit'** the PR for approval.



II. Adding Catalog Items

If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their PR by utilizing the catalog search functionality. Users can also navigate to Punchout catalogs or request items that are not on STC (Non-Catalog Item). Punchout and Non-Catalog requisitioning processes are covered in subsequent sections.

Whether the user initiated the search by clicking on **'Requisition'** from the **'Procurement'** tab, or they navigated directly to the **'Catalog'** tab, the process of searching the catalogs will act the same within the **'Catalog'** tab.

Users can search the catalogs using several methods. In addition to being able to browse the catalog by using the **'Search Bar,'** users can also shop by **'Category'** or **'Supplier.'**

1. In the **'Search Bar,'** enter the desired search criteria and click the magnifying glass or press **'Enter.'**

Notes:

- Searches recognize and return results for **'Keywords,' 'Supplier Part #,' 'Manufacturer,' 'Statewide Contract ID,'** or **'Category.'**
- The **'Search Bar'** will suggest results based on what's been entered before the search is complete and has a "fuzzy" nature to it, meaning that the system will attempt to return results that sound like the entered search criteria, not just match the results to the exact text of the search.

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- Below the **'Search Bar,'** the system will display the items and suppliers the user has most recently viewed.
- Searches can be limited to only certain categories by clicking the **'Category'** dropdown to the left of the **'Search Bar.'** This field defaults to **'All Categories'** which allows the user to search the entire site, but if a specific **'Category'** is selected in the dropdown, the system will only return results from a limited number of items.
- Users can add additional search options for **'Bid Number,'** **'Contract Type,'** or **'Statewide Contract ID'** beneath the main **'Search Bar'** by clicking the arrow to the right of the **'Search Bar'** and clicking on the options they'd like to include. These can be hidden later by clicking **'Hide Search Options.'**

The screenshot shows the NC eProcurement Expert View interface. The top navigation bar includes 'HOME', 'PROCUREMENT', and 'CATALOG'. The 'CATALOG' tab is active. On the left, there is a 'Shop By Category' sidebar with various categories like 'Computers and IT equipment', 'Machinery and Tools', etc. The main search area features a 'Search Bar' with a dropdown menu currently set to 'All Categories'. Below the search bar, there are input fields for 'Bid Number', 'Contract Type', and 'Statewide Contract ID'. A 'Hide Search Options' link is also present. The search results section displays 'Recently Viewed Items' and 'Recently Viewed Suppliers'. Annotations with arrows point to specific elements: one points to the search bar and the 'Enter' button, another points to the category dropdown, and a third points to the 'Hide Search Options' link. A yellow callout box explains the search functionality and the 'Recently Viewed' sections.

Enter search criteria in the **'Search Bar'** and click **'Enter'** or the magnifying glass icon.

Specific categories can be selected within which to limit the search by clicking the dropdown arrow to the left of the **'Search Bar.'** This selector defaults to **'All Categories.'**

Additional **'Search Option'** fields can be displayed below the **'Search Bar'** by clicking the dropdown arrow to its right and selecting which of the fields the user desires to display.

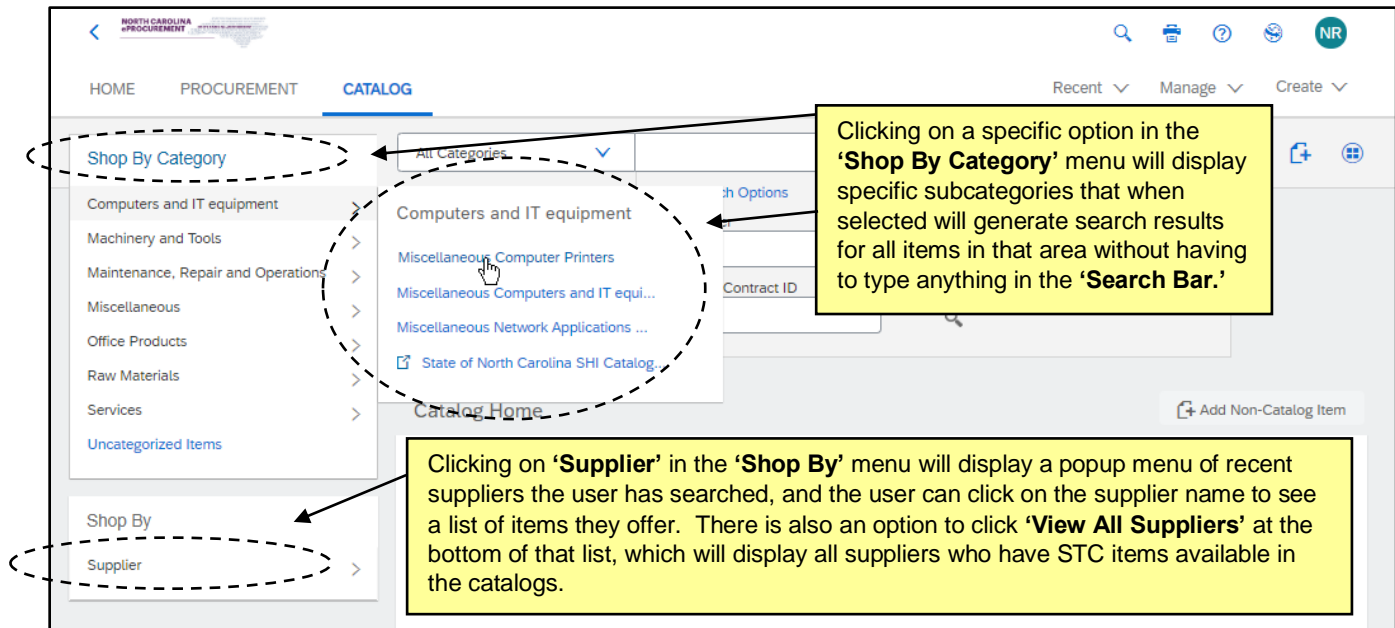
Both **'Recently Viewed Items'** and **'Recently Viewed Suppliers'** will display below the **'Search Bar.'**

Recently Viewed Suppliers			
GODWIN MFG CO INC	THOMPSON & LITTLE, INC.	[Unspecified]	SYSTEL BUSINESS EQUIPMENT CO.
Commercial and Milit...	Domestic Appliances ...	Live Plant and Anima...	Computer Printers
Machinery and Tools	Domestic Kitchenware	National Defense and...	Computers and IT equ...
Transportation Compo...	Industrial Food and ...	Other Services	Duplicating Machines
View All	View All	View All	View All

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QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY



- After conducting the search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.
- The **'Filter By'** panel on the left side of the screen will provide a mini **'Search Bar'** to further search by additional **'Keywords'** only within the results that have already returned.
- Below the **'Search Bar'** on the **'Filter By'** panel, the user will be able to refine their search by checking a box next to a system-generated suggestion in one of the following fields: **'Keyword,' 'Category,' 'Supplier,' 'Manufacturer,'** and **'Price.'** These options will automatically appear and are dependent on the search results, and the number that displays to the right of the selection indicates how many items will display.
- The **'search path'** displays the trail of the current search above the search results. Click any of the links to move back through the trail, or **'Catalog Home'** to clear the search and start over.
- The sorting bar above the search results will display the total amount of items returned in the search in the top left. The **'View'** options will default to **'List,'** but the user can alternatively select the **'Grid'** view to display a condensed view of the catalog search results.
- 'Sort by'** allows users to sort the search results in different orders. It will default to **'Relevance,'** but can be changed via the dropdown to **'Price – Ascending,' 'Price – Descending,' 'Best Selling,' 'Name – Ascending,'** or **'Name – Descending.'**
- The **'Viewing'** menu defaults to **'20 items'** per page, but the user can change the amount displayed via the dropdown by selecting **'50 items,'** or **'100 items.'**

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The 'Filter By' panel on the left side has a mini 'Search Bar' and suggested options to further refine the search. Clicking a link in the 'Search Path' allows users to move back through the search trail.

The 'View' can be set to 'List' or 'Grid' ('List' is shown here), while the items can be sorted in multiple ways and will default to 'Relevance.' The user can select how many items are displayed on the search page by clicking the dropdown next to 'Viewing.'

- Each catalog item on the results page will provide a description of the item, the 'Supplier,' 'Supplier Part #,' lead time, 'Bid Number,' 'Contract Type,' 'Statewide Contract ID,' the price of the item, its unit of measure, and a field to adjust the quantity desired.

Note: Suppliers can provide pictures for their catalog items, but not all items will have a picture.

- If a user clicks on the blue description of the item, a detailed view of the item will display.
- To view detailed supplier information, click the blue supplier name link. The 'Review Details for Supplier' screen will appear. Click 'Done' to return to the search results.

Review Details for Supplier

These are the details for the field you selected.

Company: THOMPSON & LITTLE, INC.
Corporate Website: <http://thompsonlittle.com>
Supplier: Yes
Customer: No

Done

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- Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of '**\$0.00000 USD**' and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their PR.

Items with a price of '**\$0.00000 USD**' will contain additional ordering instructions in the item description.

420A - Academia Furniture. Please navigate to the Contract Summary page on the DOA Purchase and Contract website to access the 'STC 420A Award Information' link for pricing, discount, & distributor information. To order from this contract, please create a Non-Catalog item referencing Statewide Term Contract 420A and issue to an authorized distributor.

\$0.00000 USD / each

- Items with '**(DIST)**' in front of their description indicate that the item is supplied by a distributor, not necessarily the STC vendor. Multiple seemingly identical catalog items will appear for the same product, but they will have different suppliers listed. The user may choose any of the items as they are the same, but they will be delivered from a different location. In essence, the user will be choosing based on the '**Supplier**' listed, perhaps taking proximity to the distributors' locations into account.

Items with '**(DIST)**' in front of the description will be displayed multiple times. The only difference in the products being the '**Supplier**.' Users may choose any of the similar items in this instance, as they will all be the same, they'll just be shipped from different locations.

Two identical items besides the different '**Supplier**.'

(DIST) ARGON-98%/OXYGEN-2% MIX GAS, COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE 336cf (6)

Supplier: ANDY OXY COMPANY, INC.

Supplier Part #: G01 SP204-300

Available in: 0 Day(s)

Bid Number: 201600897

Contract Type: T

Statewide Contract ID: 430A

\$8.88000 USD / each

(DIST) ARGON-98%/OXYGEN-2% MIX GAS, COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE 380cf (4)

Supplier: Arc3 Gases

Supplier Part #: G01 SP204-300

Available in: 0 Day(s)

Bid Number: 201600897

Contract Type: T

Statewide Contract ID: 430A

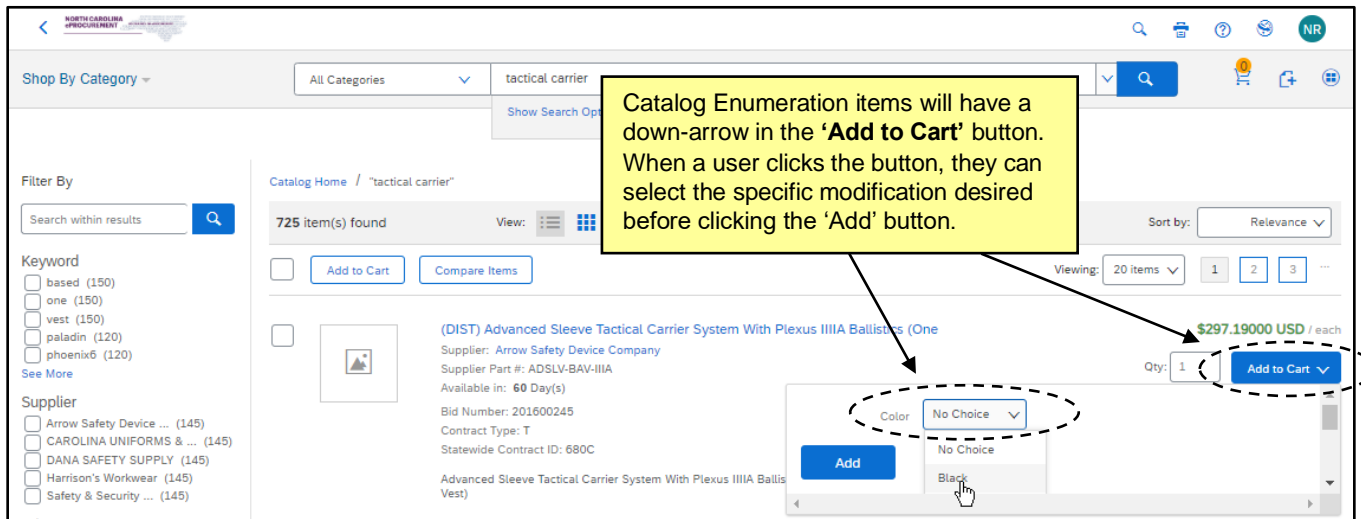
\$8.88000 USD / each

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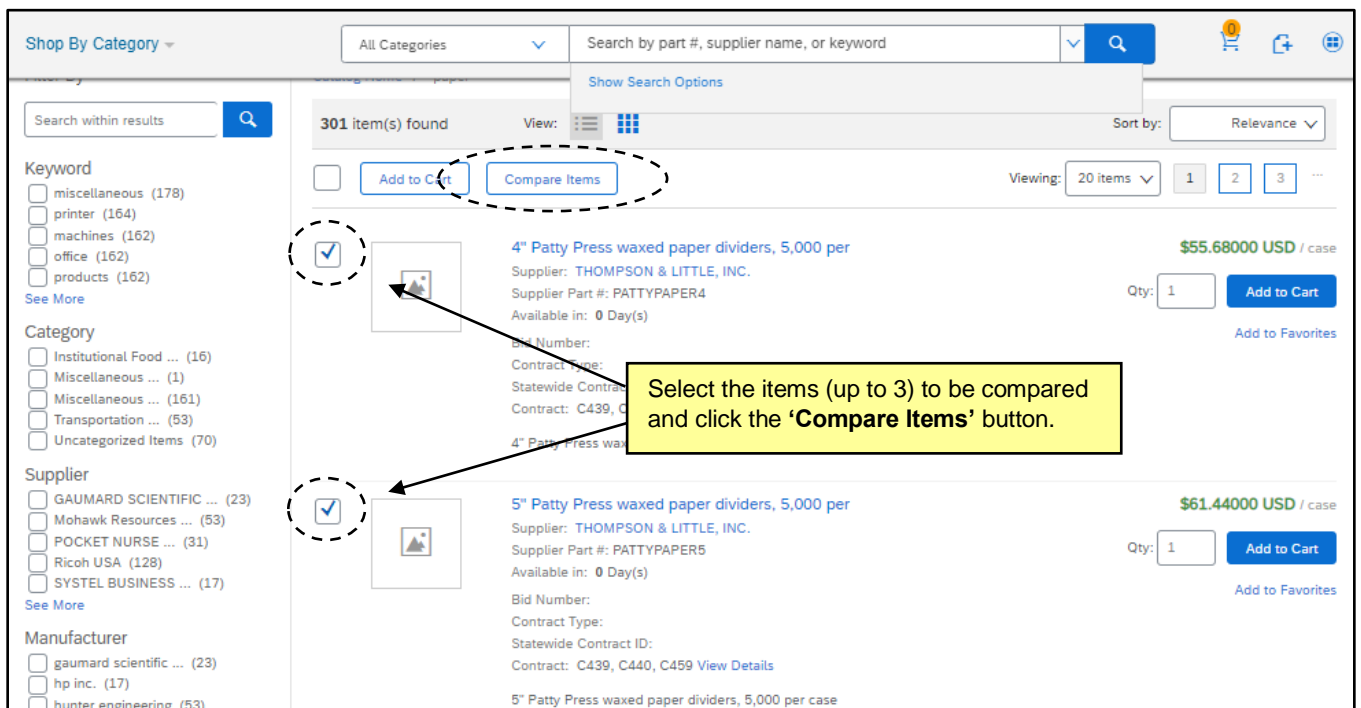
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14. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Purchase Requisition (e.g., size, color, delivery options). When an Enumeration item is returned in a search, the **'Add to cart'** button will have a down-arrow in the box next to the text. When the user clicks the button, a dropdown box will display the options for the user to choose from another dropdown menu. The user will need to select the preferred option before clicking **'Add.'**



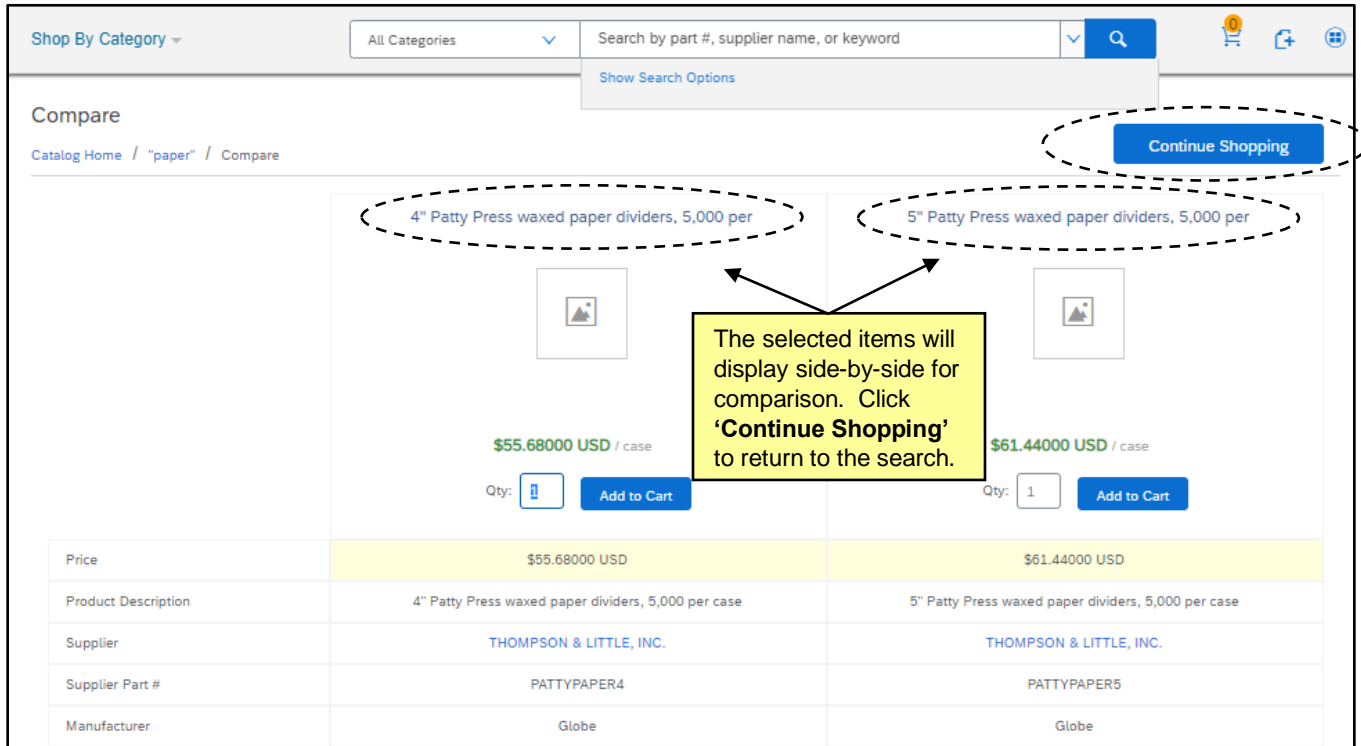
15. Two or three items can be compared side by side to quickly review the attributes of those items. Check the boxes next to the items to be compared and click the **'Compare Items'** button.



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16. The **'Compare'** page will be displayed. Once the information has been reviewed, click **'Continue Shopping'** to return to the search results or add the desired item directly to the cart from this page after adjusting the quantity.



The screenshot shows the 'Compare' page in the NC eProcurement system. At the top, there is a search bar with the text 'Search by part #, supplier name, or keyword' and a 'Show Search Options' link. Below the search bar, the page title 'Compare' is displayed, followed by a breadcrumb trail: 'Catalog Home / "paper" / Compare'. On the right side, there is a blue button labeled 'Continue Shopping'. The main content area displays two items side-by-side for comparison. Each item has a title, a product image, a price, a quantity selector, and an 'Add to Cart' button. A yellow callout box with a black border points to the 'Continue Shopping' button and the 'Add to Cart' buttons, containing the text: 'The selected items will display side-by-side for comparison. Click **'Continue Shopping'** to return to the search.' Below the items, there is a table with the following data:

	4" Patty Press waxed paper dividers, 5,000 per	5" Patty Press waxed paper dividers, 5,000 per
Price	\$55.68000 USD	\$61.44000 USD
Product Description	4" Patty Press waxed paper dividers, 5,000 per case	5" Patty Press waxed paper dividers, 5,000 per case
Supplier	THOMPSON & LITTLE, INC.	THOMPSON & LITTLE, INC.
Supplier Part #	PATTYPAPER4	PATTYPAPER5
Manufacturer	Globe	Globe

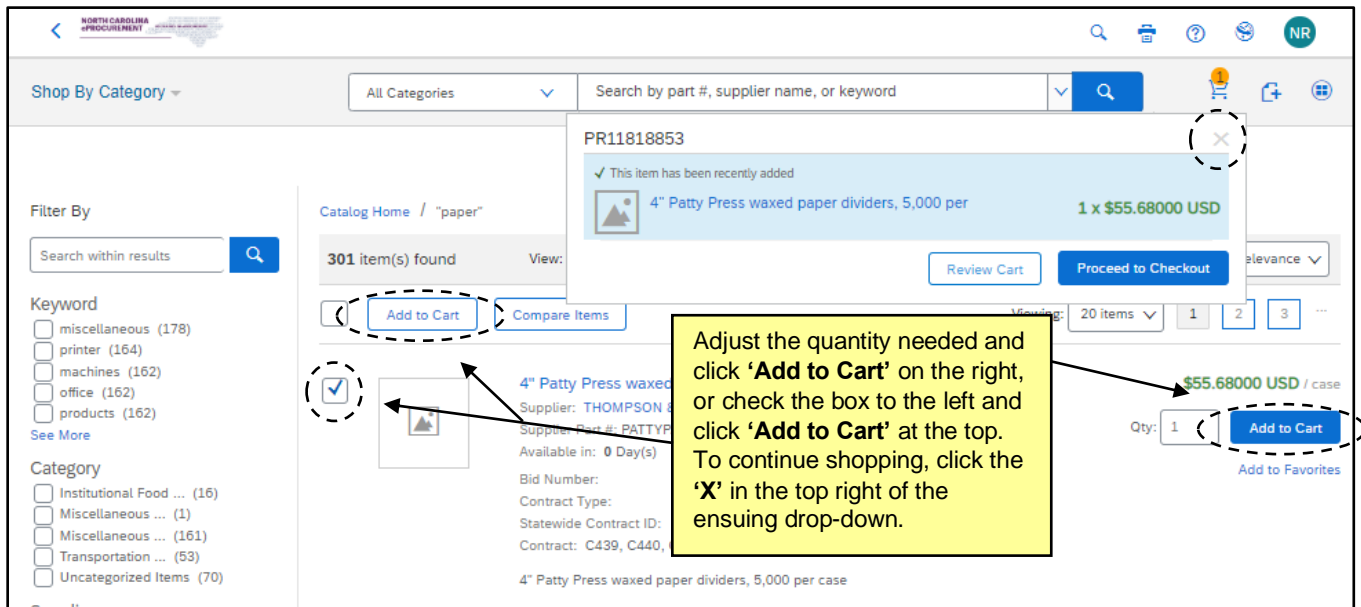
17. If a user finds the desired item and adjusts the quantity needed, they can click the blue **'Add to Cart'** button on the right, or they can check the box to the left of the item and click the **'Add to cart'** button at the top of the results. A yellow bubble indicating the number of items they have in their cart will display above the shopping cart icon in the upper right. A drop-down box will give the user an opportunity to **'Proceed to Checkout'** or **'Review Cart.'** They can also click the **'X'** in the top right of the drop-down box to continue shopping for another item on that particular STC.

Note: Multiple catalog items can be added to the same PR, but they have to be from the same STC. The system will prevent items from more than one STC to be included on the same PR, and the user will be notified with an error message. For this reason, a **'Non-Catalog item'** cannot be added to a PR with a catalog item already on it.

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PR11818853

✓ This item has been recently added

4" Patty Press waxed paper dividers, 5,000 per

1 x \$55.68000 USD

Review Cart Proceed to Checkout

301 item(s) found

Add to Cart Compare Items

Adjust the quantity needed and click 'Add to Cart' on the right, or check the box to the left and click 'Add to Cart' at the top. To continue shopping, click the 'X' in the top right of the ensuing drop-down.

4" Patty Press waxed paper dividers, 5,000 per case

Supplier: THOMPSON & LITTLE

Supplier Part #: PATTYP

Available in: 0 Day(s)

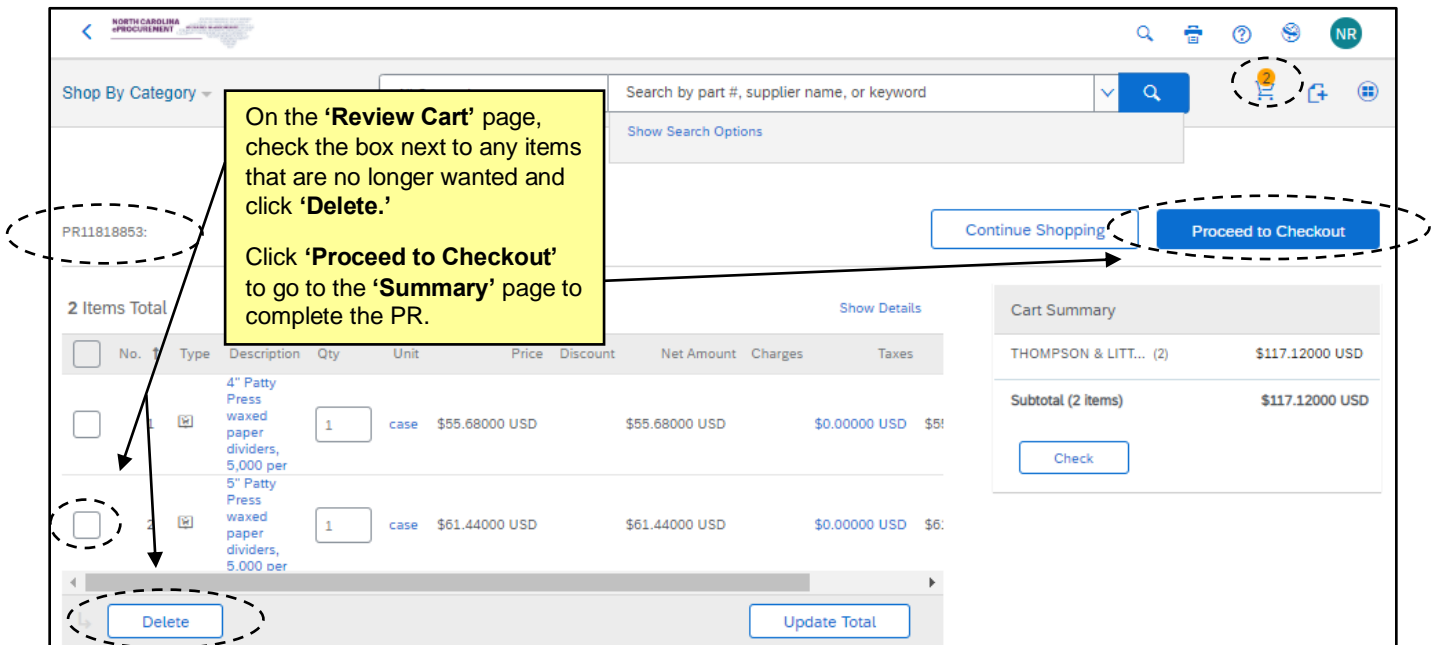
Bid Number:

Contract Type:

Statewide Contract ID:

Contract: C439, C440, C441

18. If the user clicks 'Review Cart,' a more detailed view of the shopping cart for that PR will display. The user can delete any unwanted items by checking the box next to those they no longer want and clicking the 'Delete' button. They can click 'Continue Shopping' to leave the items in the cart and return to catalogs, or they can click the blue 'Proceed to Checkout' button if they are ready to purchase the items in the cart. They will be directed to the 'Summary' page where they can finalize the details of the PR.



On the 'Review Cart' page, check the box next to any items that are no longer wanted and click 'Delete.'

Click 'Proceed to Checkout' to go to the 'Summary' page to complete the PR.

Continue Shopping Proceed to Checkout

2 Items Total

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes
1		4" Patty Press waxed paper dividers, 5,000 per	1	case	\$55.68000 USD		\$55.68000 USD	\$0.00000 USD	\$55.68000 USD
2		5" Patty Press waxed paper dividers, 5,000 per	1	case	\$61.44000 USD		\$61.44000 USD	\$0.00000 USD	\$61.44000 USD

Delete Update Total

Cart Summary

THOMPSON & LITT... (2) \$117.12000 USD

Subtotal (2 items) \$117.12000 USD

Check

III. Adding Catalog Item Favorites

Users may add specific Statewide Term Contract (STC) items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). Favorite items can be organized within folders or they can be unclassified.

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Note: 'Favorite Lists' from Guided Buying do not carry over into Expert View and vice versa.

1. To mark an item as a favorite, execute a catalog search for the desired item.
2. Click the **'Add to Favorites'** link next to the item. A pink star next to the text **'My Favorite Items'** will display where the **'Add to Favorites'** link just was to notify the user this item has been favorited.

Shop By Category ▾ All Categories ▾ air filter

Search within results 🔍

2,896 item(s) found View: [List View] [Grid View] Sort by: Relevance ▾

Viewing: 20 items ▾ 1 2 3 ...

Keyword

- ☐ metal (1484)
- ☐ pleated (1456)
- ☐ synthetic (903)
- ☐ perfectpleat (729)
- ☐ self-supported (729)

See More

Category

- ☐ Industrial ... (36)
- ☐ Institutional Food ... (5)
- ☐ Miscellaneous ... (2855)

Supplier

- ☐ Capital Air Filters ... (2855)
- ☐ THOMPSON & LITTLE ... (41)

Manufacturer

- ☐ aaf flanders (1608)

10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY

Supplier: Capital Air Filters, Inc.

Supplier Part #: AFP1000-10202

Available in: 7 Day(s)

Bid Number:

Contract Type:

Statewide Contract ID:

Contract: C386 View Details

10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY

CAPACITY, MERV 8, METAL MESH BACKING, PLEATED AIR FILTER

\$2.24000 USD / each

Qty: 1 Add to Cart

★ My Favorite Items | Edit ▾

BAG AIR FILTER, 12X24X15, 5 POCKET, MERV 11-A,

Supplier: Capital Air Filters, Inc.

Supplier Part #: RV1112241505- REVOLUTION 12X24X15 M11-A 5P

Available in: 0 Day(s)

Bid Number:

\$33.17000 USD / each

Qty: 1 Add to Cart

Add to Favorites

Indication that an item has been added as a favorite.

Click the 'Add to Favorites' link to add the item as a favorite.

3. When an item has been marked as a favorite, the user can click the **'Edit'** dropdown next to the favorite indicator to further organize the item. They can click the ensuing drop-down to add the item to an existing **'Folder,'** or create a new **'Folder'** to add that item to. If they no longer wish to mark that item as a favorite, they can click the **'Remove'** button

Shop By Category ▾ All Categories ▾ air filter

Search within results 🔍

2,896 item(s) found View: [List View] [Grid View] Sort by: Relevance ▾

Viewing: 20 items ▾ 1 2 3 ...

Keyword

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Supplier: Capital Air Filters, Inc.

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Available in: 7 Day(s)

Bid Number:

Contract Type:

Statewide Contract ID:

Contract: C386 View Details

10X20X2, AFP1000, PLEATED AIR FILTER, ECONOMY

CAPACITY, MERV 8, METAL MESH BACKING, PLEATED AIR FILTER

\$2.24000 USD / each

Qty: 1 Add to Cart

★ My Favorite Items | Edit ▾

My Favorite Items

In Folder:

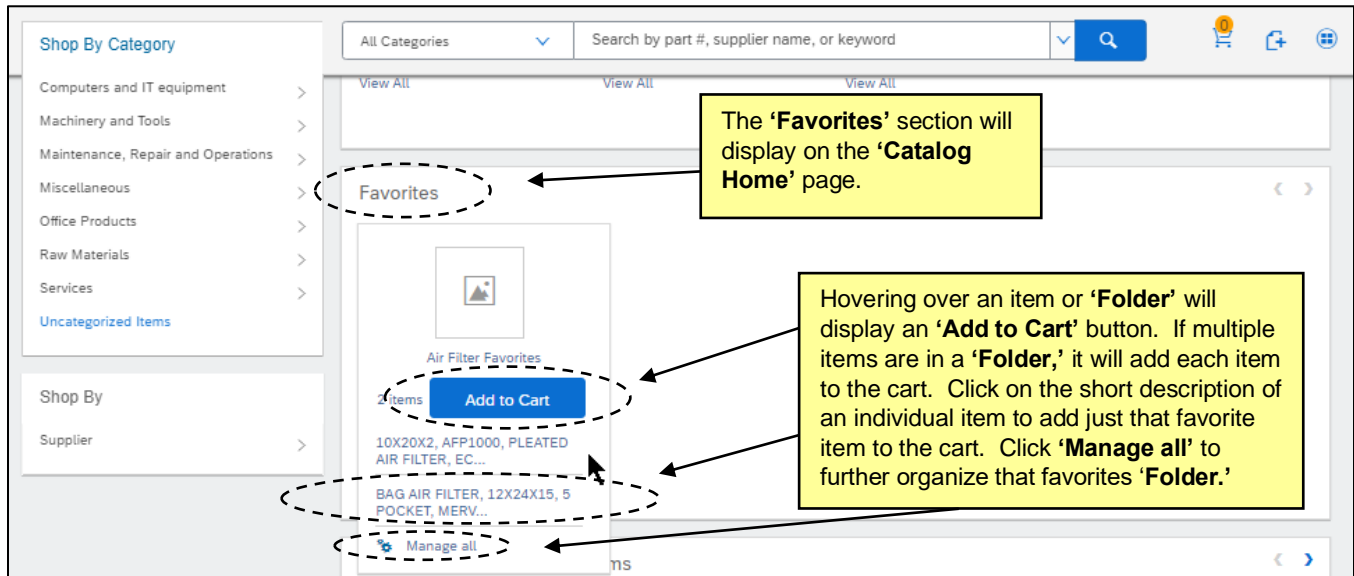
Not added to any folder ▾

Remove Done

Click 'Edit' to further organize a favorite item into a specific 'Folder' selected from the dropdown.

To remove the favorite designation from an item, click the 'Remove' button.

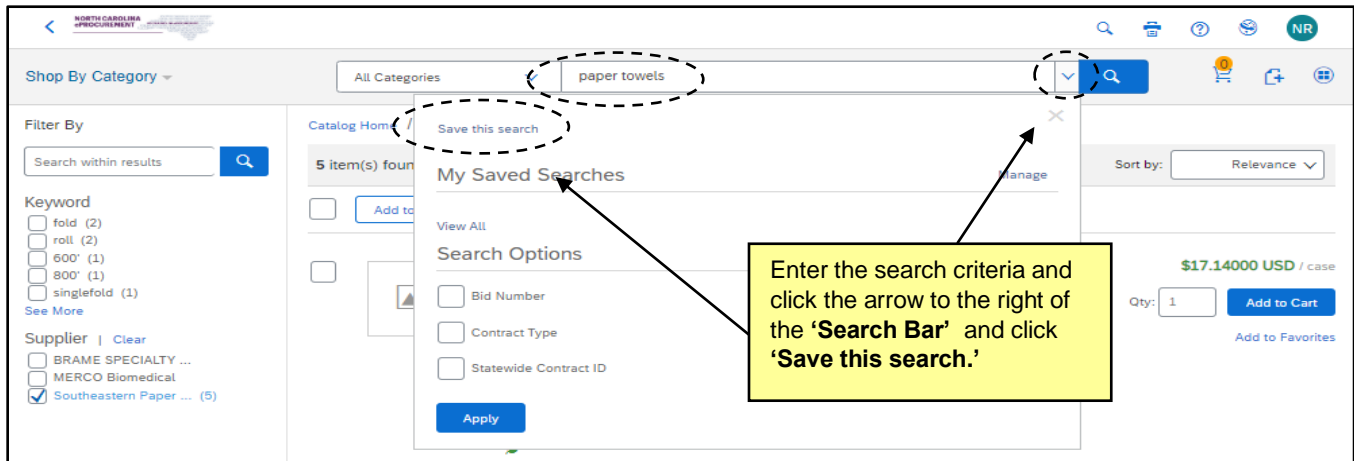
- Once an item has been marked as a favorite, it will display in the **'Favorites'** section on the **'Catalog Home'** page below the **'Recently Viewed Suppliers'** section, either within a **'Folder'** or just as itself if it was not organized within one. Hovering over the item or **'Folder'** will display an **'Add to Cart'** button. If there are multiple items in a **'Folder,'** clicking this button will add each of the items to the cart. To add just one item, click on the brief description of that item below **'Add to Cart,'** and do so on the subsequent **'Detailed View'** page. Click **'Manage all'** to delete items from that **'Folder,'** or to rename or delete the entire **'Folder.'**



IV. Saving Catalog Searches

Users may save frequently used catalog searches for future reference. This can be helpful for users that add the same type of line items to a Purchase Requisition (PR) on a regular basis.

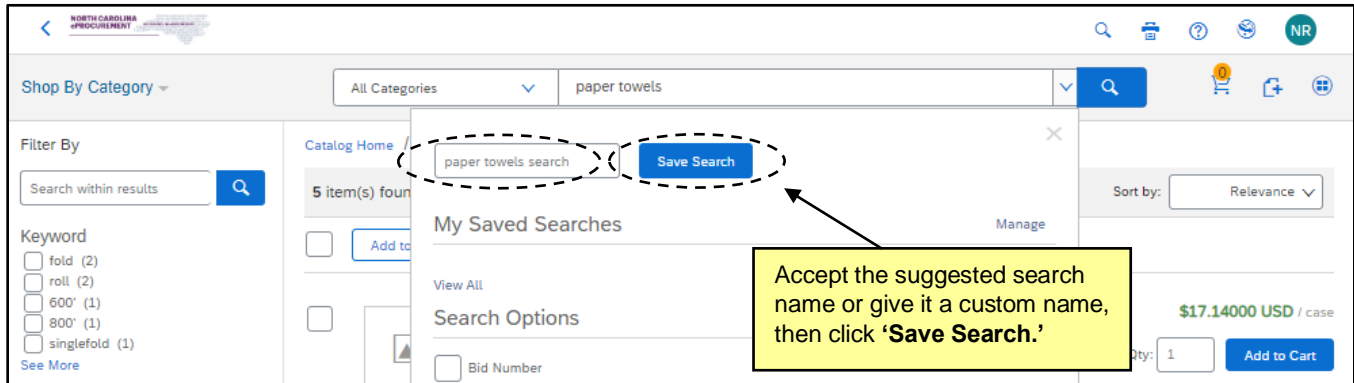
- From the **'Catalog Home'** page, users should run the catalog search using the same parameters as the search that they would like to be saved. The results will be displayed based on the requirements that the user has entered.
- Click the arrow to the right of the **'Search Bar'** and click **'Save this search'** from the ensuing dropdown.



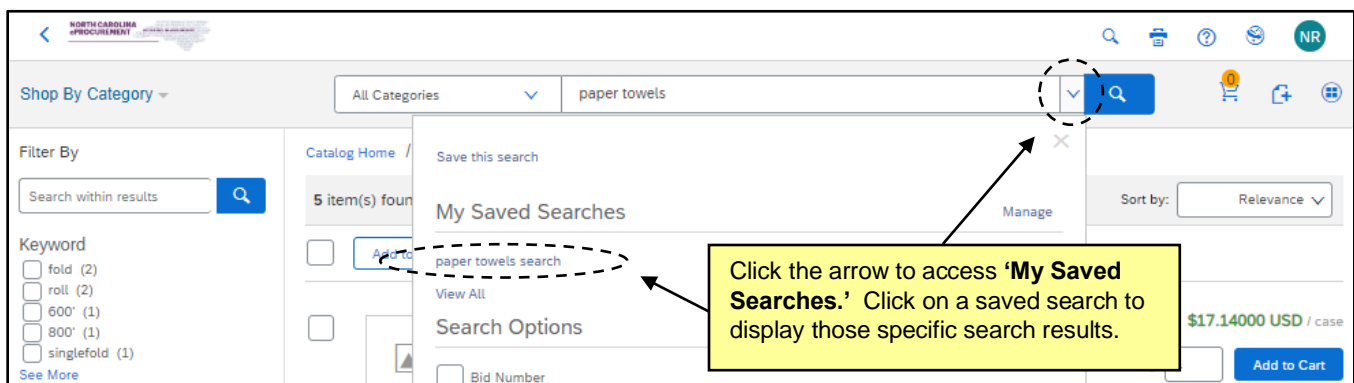
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3. A suggested search name will populate in a free-text field next to a blue **'Save Search'** button. The user can accept the suggested name or rename it with another name of their choice, then click **'Save Search.'** A message will display notifying the user that the search has been saved.



4. To access their saved searches, users can click the arrow to the right of the **'Search Bar,'** and the dropdown will display a section called **'My Saved Searches.'** Users can click on the searches listed to see the items in that search, or they can click **'View all'** or **'Manage'** if there are too many saved searches to display in the dropdown. The subsequent screen will allow for further editing and searching.



V. Adding Punchout Catalog Items

Some State of North Carolina Statewide Term Contract (STC) suppliers have created punchout websites containing negotiated term contract items. These punchout sites are accessible through the NC eProcurement term contract catalogs. A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. Users do not need to enter a new user ID or password to enter the supplier's punchout site. The supplier's website will automatically recognize users from NC eProcurement, and after the buyer has selected items on the supplier's website, the items are automatically transferred into NC eProcurement as line items on the Purchase Requisition (PR). Once completed, the purchase order will be delivered to the supplier through NC eProcurement.

1. After clicking the **'Requisition'** link on the **'Procurement'** tab, start a search on the **'Catalog'** tab by entering text into the **'Search Bar,'** or by clicking on a **'Category'** or **'Supplier.'**

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SOURCING
BIDDING
BUY

Note: The **'Search Bar'** will return results by **'Category'** (ex: Office Supplies), **'Supplier'** (ex: FSI), or **'Statewide Contract ID'** (ex: 615A) that may lead the user to a punchout catalog. Alternatively, if the user enters the keyword **'Punchout'** in the **'Search Bar,'** the only results returned will be links to punchout catalog sites.

- Punchout catalog results will not show individual items with prices like standard catalog items. A catalog item with the supplier's name, logo, and a blue **'Buy from Supplier'** button will display for each punchout catalog link.

Note: Users can add a punchout catalog link as a favorite by clicking **'Add to Favorites'** just like with standard catalog items.

Enter **'punchout'** in the **'Search Bar'** to return only punchout catalog suppliers. Click **'Add to favorites'** to save the link to a particular punchout vendor as a favorite. Click **'Buy from Supplier'** to be directed to the supplier's punchout website.

Buy from Supplier
Add to Favorites

Buy from Supplier
Add to Favorites

Buy from Supplier
Add to Favorites

- The user will be directed to the supplier's punchout catalog site. The page will still be branded with **'NC eProcurement'** at the top, but the content of the site will be maintained by the supplier. Since the individual supplier creates their own punchout site, each site may differ in appearance and navigation; however, each site will have the same basic logic. When shopping on a punchout site, users will add the desired items to the shopping cart on that site, then click **'Submit'** to automatically send the selected items back to their **'NC eProcurement'** shopping cart.

Note: If a buyer decides to end a punchout shopping session before any items are selected, they may return to the PR by clicking on **'Close Punchout Catalog Shopping Session.'**

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LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

When the user is done searching for their items on the supplier's punchout site, click **'Submit Cart'** to send the items back to the PR.

If the user did not add any items, they can click **'Close Punchout Catalog Shopping Session'** to return to 'NC eProcurement.'

- Once the punchout item(s) have been sent back to NC eProcurement, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the supplier's punchout catalog site and re-submit their punchout cart. To access the punchout site again for those specific items, click on the **'Description'** of any of the line items from the **'Shopping Cart'** if the items have not yet reached the **'Checkout'** stage, or when editing the PR on the **'Summary'** page if the user has already clicked **'Proceed to Checkout.'**

Click on the **'Description'** of a punchout item to return to that punchout shopping session to edit existing items or add more items from that supplier.

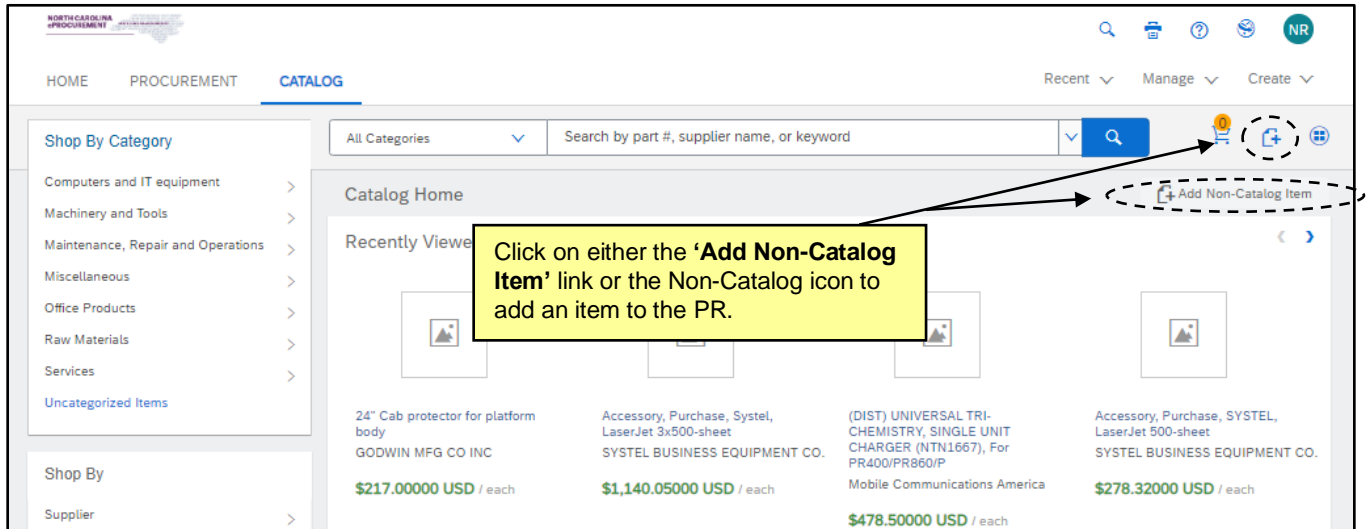
VI. Adding Non-Catalog Items

Users may manually add **'Non-Catalog'** items to a Purchase Requisition (PR) when a catalog item is not available or when they are ordering from a vendor that is not on a Statewide Term Contract (STC).

NC eProcurement

Creating Purchase Requisitions: Expert View

1. After clicking the **'Requisition'** link on the **'Procurement'** tab, or by starting directly on the **'Catalog'** tab, click on the **'Add Non-Catalog Item'** link or click on the Non-Catalog icon to the right of the shopping cart icon.



2. The **'Create Non-Catalog Item'** page will display for the user to enter non-catalog information.
3. **Full Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).
4. **Terms of Payment:** This field initially defaults to **'(no value)'** and can only be edited by a user with the **'Purchasing Agent'** role. Once a **'Supplier'** is selected below, it will change to **'N30.'**
5. **Commodity Code:** Locate the appropriate commodity code that describes the item being purchased by using the drop-down menu. If a desired commodity code is not listed in the drop-down menu, select **'Search more'** to search for the appropriate code. Users may search by commodity code or keyword.

Notes:

- It is important to select the appropriate **'Commodity Code'** as the State of North Carolina uses this for reporting purposes. The codes listed are part of the United Nations Standard Products and Services (UNSPSC) commodity code structure. Codes that begin with a '7,' '8,' or '9' describe service type codes. These codes should not be used when purchasing goods.
- It is required that users enter a **'Commodity Code'** out to the sixth digit. Codes are organized in layers of twos, so the user must choose from the third layer. Adding a code from the first or second layer will not be prohibited on this page, but the user will receive an error when they attempt to **'Submit'** the PR if the selection does not have six digits.
- For further instruction on selecting the correct category, please refer to the **'Selecting a UNSPSC Commodity Code'** job aid.

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Creating Purchase Requisitions: Expert View

Choose Value for Commodity Code

Name

Name ↑

- ▼ All Commodities
 - ▼ 10 - Live Plant and Animal Material and Accessories and Supplies
 - ▼ 1010 - Live animals
 - 101015 - Livestock 101015
 - 101016 - Birds and fowl 101016
 - 101017 - Live fish 101017

Search for the appropriate 'Commodity Code' via UNSPSC, either by name or ID. To view the commodity code drop-down menu by header, click the arrow next to the category. The drop-down menu will expand to show the list of choices under the main header. Users must select a six-digit category.

6. **Quantity:** Enter the appropriate Quantity.
 7. **Unit of Measure:** Locate the appropriate Unit of Measure in the drop-down menu if the default value of 'each' is not correct. If the desired Unit of Measure is not listed in the drop-down menu, choose 'Search more' to find the appropriate value.
 8. **Price:** Enter the Price of the item.
- Note:** It is advised that users ignore the 'Additional Pricing Details' link below this field, as it provides advanced options that are rarely needed for a basic purchase.
9. **Amount:** This field is automatically calculated based on the information entered above.
 10. **Update Amount:** Click this button to recalculate 'Amount' when changes are made to the item being added.
 11. **Contract Type:** Select the appropriate contract type if applicable. The field will default to 'No Choice,' which is fine if the item is not already on a Statewide or Agency contract. This will likely be the case for most non-catalog items, but there may be instances in which a user needs to enter a contract item that is not available via catalogs as a non-catalog item, and selecting the correct 'Contract Type' will be important. The options available in the drop-down menu are as follows:
 - a. **Term Contract Statewide:** A contract for goods or services negotiated by P&C and available to all State purchasers. These items can often be found via the catalogs.
 - b. **Term Contract Agency Specific:** A contract for goods or services negotiated by a specific Agency to cover a specific period of time. These items are not available via the catalogs.
 - c. **Term Contract IT Convenience:** A contract for goods or services negotiated by DIT and available to all State purchasers. These items can often be found via the catalogs.
 - d. **No Contract:** The item is not associated with any contract. This is the same as 'No Choice,' so it is not necessary to select this if the user leaves 'No Choice' as the default.
 - e. **Agency Contract:** A contract for goods or services negotiated by a specific Agency for a spot-buy (nonrecurring) purchase. These items are not available via the catalogs.

Note: Selecting 'Term Contract Statewide' or 'Term Contract IT Convenience' from the drop-down menu will add an additional 'Statewide Contract ID' field to the page. Users may choose the drop-down menu in this new field and select 'Search more' to search for and select the Statewide Contract from which the item is being purchased. Selecting 'Term Contract Agency Specific' or 'Agency Contract' from the drop-down menu will also add an additional 'Agency Contract ID' field to the page, but in this case, the field is a free text field where the user can key the appropriate information. Entering the correct contract information allows the State of North Carolina to accurately track and report against contract purchases.

This screenshot shows the 'Create Non-Catalog Item' form. A yellow callout box on the left states: 'If a 'Contract Type' of 'Term Contract Statewide' or 'Term Contract IT Convenience' is selected, an additional 'Statewide Contract ID' field will display with a drop-down selector.' The form shows 'Contract Type' set to 'Term Contract Statewide'. Below it, 'Bid Number' is '(no value)'. 'Payment Basis' is 'Receipt'. 'Blanket Purchase Order?' is 'No'. A new 'Statewide Contract ID' field is shown with a drop-down arrow. 'FOB Code' is '(NCAS) 001 - Destination freight paid by vendor and included in price. Ti...'. 'Recycled Content Indicator' is 'No'.

This screenshot shows the 'Create Non-Catalog Item' form with 'Contract Type' set to 'Term Contract Agency Specific'. The yellow callout box states: 'If a 'Contract Type' of 'Term Contract Agency Specific' or 'Agency Contract' is selected, an additional 'Agency Contract ID' field will display with a free-text field.' The form shows 'Bid Number' as '(no value)', 'Payment Basis' as 'Receipt', 'Blanket Purchase Order?' as 'No', and a new 'Agency Contract ID' field as a free-text input. 'FOB Code' remains '(NCAS) 001 - Destination freight paid by vendor and included in price. Ti...'. 'Recycled Content Indicator' is 'No'.

12. **Bid Number:** This field will default to '(no value)' and is optional unless the user selects a 'Contract Type' of 'Term Contract Statewide' or 'Term Contract IT Convenience.' If the user does select one of those options, they should then select the appropriate 'Statewide Contract ID' from that dropdown before going back to the 'Bid Number' field where they can click the drop-down arrow, click 'Search more,' and they'll see the bid number that corresponds with the specific 'Statewide Contract ID' they selected. There should only be one option to select, and the user should add it to the PR by clicking 'Select.'
13. **Payment Basis:** Defaults to 'Receipt' (for goods) or 'Signature' (for services) based on the Unit of Measure specified. 'PO' can also be selected from the dropdown menu. This information is passed to NCAS to determine the payment basis in NCAS.
14. **Blanket Purchase Order?:** Choose whether the purchase is a Blanket order or a Non-Blanket order. This will default to 'No' for Non-Blanket, but the selection can be switched to 'Yes' if necessary.
15. **FOB Code:** This field defaults to '(NCAS) 001' for all orders, but can be changed in the drop-down.

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16. **Recycled Content Indicator:** Select the appropriate radio button to reflect whether or not the item contains recycled products. This field will default to 'No.'
17. **Supplier:** Locate the supplier in the drop-down menu. If the supplier is not listed in the drop-down menu, choose 'Search more' to search for the appropriate supplier. Suppliers can be sorted or searched by 'Supplier Name,' 'Supplier ID,' or 'Hub Status.'
18. **Location:** Click on 'Select' if a different location for the supplier is preferred than the defaulted location once a supplier is selected.
19. **Supplier Part Number:** Enter the Supplier Part Number (if known). This will assist the vendor in shipping the correct item.
20. **Supplier Auxiliary Part Number:** Enter the Supplier Auxiliary Part Number (if known). This will additionally assist the vendor in shipping the correct item.
21. When all required fields are complete, the user can click the 'Add to cart' button at the top or bottom of the screen. If a field is incorrect or incomplete, it will be outlined in red and accompanied by an error message until it's corrected.

Create Non-Catalog Item

Full Description: * Sample non-catalog item

Terms of Payment: N30

Commodity Code: * 101015 - Livestock

Quantity: 1

Unit of Measure: each

Price: * \$25.0000 USD

Amount: \$25.00000 USD

Contract Type: No Choice

Bid Number: (no value)

Payment Basis: * Receipt

Blanket Purchase Order? ☐ Yes ☒ No

FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title pas...

Recycled Content Indicator: ☐ Yes ☒ No

Supplier Information

Supplier: Performance Livestock & Feed Co., Inc.

Location: Performance Livestock & Feed Co. [select]

Terms of Payment: N30

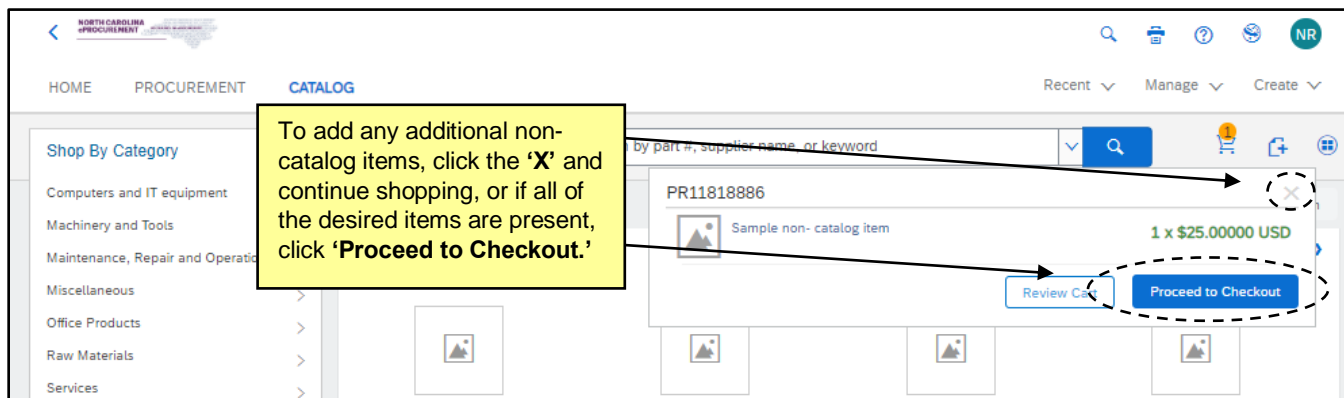
Supplier Part Number:

Supplier Auxiliary Part ID:

Callout Box: Fill in all applicable fields and click 'Add to Cart' at the top or the bottom of the screen to add the non-catalog item to the PR.

Buttons: Add to Cart, Cancel

22. The user will be returned to the **'Catalog'** tab, and yellow bubble indicating the number of items they have in their cart will display above the shopping cart icon in the upper right. A drop-down box will give the user an opportunity to **'Proceed to Checkout'** or **'Review Cart.'** They can also click the **'X'** in the top right of the drop-down box to continue shopping and adding another non-catalog item by clicking either of the two initiators in the upper right.



VII. Selecting 'Unit of Measure' for Non-Catalog Items

When entering a **'Non-Catalog item,'** users **must** follow the below **'Unit of Measure'** guidelines that differ based on whether the item is a **'Blanket'** or a **'Non-Blanket'** item, and whether it is classified as a **'Good'** or a **'Service.'** If the values entered into the fields are not aligned correctly, an error message will display on the **'Blanket Purchase Order?'** field until they are properly aligned.

Line Item Classification	Unit of Measure		
	Dollar	Hour	All Others
Non-Blanket/Good	NO	NO	YES
Blanket/Good	YES	NO	NO
Non-Blanket/Service	YES	NO	NO
Blanket/Service	NO	YES	NO

Non-Blanket Good

- Set the **'Quantity'** to the total number of units to order.
- Set the **'Unit of Measure'** to anything **except** 'Dollar' or 'Hour' (example: 'Each').
- Set the **'Price'** to the price of the individual unit.

When receiving this type of order, receive against the quantity ordered.

Blanket Good

- Set the **'Quantity'** to the total dollar amount of the order.
- Set the **'Unit of Measure'** to **'Dollar.'**
- Set the **'Price'** of the item to **'\$1.00.'**
- Mark the blanket purchase indicator to **'Yes.'**

When receiving this type of order, receive against the dollar amount.

Non-Blanket Service

- Set the **'Quantity'** to the total dollar amount of the service.
- Set the **'Unit of Measure'** to **'Dollar.'**
- Set the **'Price'** of the item to **'\$1.00.'**

When receiving this type of order, receive against the dollar amount.

Blanket Service

- Set the **'Quantity'** to the total number of hours to hire.
- Set the **'Unit of Measure'** to **'Hour.'**
- Set the **'Price'** to the price per hour.
- Mark the **'Blanket Purchase'** indicator to **'Yes.'**

When receiving against this type of order, receive against the number of hours.

VIII. Summary Page

The **'Summary'** page allows the user to enter a title as well as shipping, comment, and attachment information. It also allows the user to review the Purchase Requisition (PR) for accuracy. The approval flow for the PR can be viewed on the **'Summary'** page as well.

1. Once on the **'Summary'** page, the PR number will display in the top left of the screen, and the user is required to enter a **'Title.'** The title should be descriptive of the items being purchased and can be used to make the PR easily identifiable.
2. **'Entity'** defaults to the user's entity and can't be changed.
3. The **'On Behalf Of'** field will default to the requester's name. To create a PR on behalf of another user, use the **'On Behalf Of'** drop-down menu and select that user's name. If the user does not appear in the drop-down menu, select **'Search more'** and search for the user in the pop-up window that appears.
4. The **'Delay Purchase Until'** field allows the PR to be submitted and approved but not be distributed to the supplier until the date specified.

Note: Funds will not be encumbered in NCAS until the date specified in the **'Delay Purchase Until'** field and a purchase order is successfully created with a status of **'Ordered.'**

5. The **'Suppress Order'** box defaults to unchecked meaning that the purchase order, when created, will NOT BE SUPPRESSED and **will be sent** to the supplier. If the user adds a check to the box, the supplier will **not** receive a copy of the purchase order.
6. The **'Buying Entity'** field will default to the buying entity that is selected in the user's profile. It can be updated using the **'Buying Entity'** drop-down menu. If the desired buying entity does not appear in the drop-down menu, select **'Search more'** and search for the desired selection.

7. The **'Pass to Budget Officer'** field defaults to **'No,'** meaning the PR will stay on its normal approval path. If the selection is switched to **'Yes,'** the Override Budget Officer will be added in the approval flow to review the requisition and update the accounting information.
8. The **'FOB Code'** (Freight on Board) reflects how freight charges for the order are paid. This value defaults to **'(NCAS) 001.'** Users may select a different option that better meets the agency purchasing policies by using the drop-down menu.
9. Click **'Apply Label...'** to add a label to the PR. In the drop-down, the user can select their default **'Archive Items,'** or create a **'New Label.'**
10. The **'Ship To'** field automatically defaults to the ship to location set up in the user's profile. Users may choose a different option by selecting **'Search more'** from the drop-down menu.

Note: The **'Ship To'** drop-down menu contains the ship-to addresses that have been entered by an administrator. These addresses are agency specific.
11. The **'Deliver To'** field indicates the recipient of the order. This free-text field can be populated with any value, most commonly with the requester's name. This field can be defaulted in the user's profile so that it is automatically filled.
12. The **'Need-by Date'** field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.
13. Comments may be added for the entire PR using the **'Comments'** field. The requester may add only one comment on the header level of the PR. If more comments are needed, they may be added after the PR has been submitted. Click the **'Visible to Supplier'** box if it is desired that the comment be shared with the vendor.
14. Attachments may be added to the PR at the header level by clicking the **'Add Attachment'** link.

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PR11818887: Sample Expert View PR

Summary

Title: * Sample Expert View PR

Entity: 13 - Department of Administration

On Behalf Of: NCAS Requester

Delay Purchase Until:

Suppress Order: ☐ *Leave the 'Suppress Order' box unchecked to send the order to the vendor.*

Buying Entity: 13EG

Pass to Budget Officer: ☐ Yes ☒ No

FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.

My Labels: Apply Label...

Ship To: * 437

Deliver To: * requester

Need-by Date:

Comments: *Add comments at the header level in the 'Comments' box and check the 'Visible to Supplier' box to share it with the vendor.*

☒ Visible to Supplier

Attachments: [Add Attachment](#) *Click the 'Add Attachments' link to add any relevant attachments.*

Cart Summary

Item	Quantity	Price
THOMPSON & LITT... (2)	2	\$117.12000 USD
Total (2 items)		\$117.12000 USD

15. The 'Add Attachment' page is displayed after the 'Add Attachment' link has been clicked at the header level on the 'Summary' page. Click the 'Browse' button to locate and select an attachment, then click 'OK' once the attachment is selected to populate the 'File' field.

Notes:

- The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xml, and .zip
- The maximum combined file size limit for attachments is 10MB.

Add Attachment

File:

☐ Visible to supplier on the purchase order *Select the checkbox besides 'Visible to supplier on the purchase order' to include attachments on the purchase order.*

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16. Once an attachment has been added to a PR, the user can add more attachments by clicking the **'Add Attachment'** button below the newly visible **'Attachments'** section. Users may also change an existing attachment's visibility to the supplier by checking or unchecking the **'Visible to Supplier'** checkbox. Finally, users may delete unwanted attachments by clicking the corresponding **'Delete'** button.

File Name ↑	Size	Creator	Visible to Supplier on Order
Sample Attachment.docx Download	14.4 KB	NCAS Requester	<input checked="" type="checkbox"/> Delete

[Add Attachment](#)

The system generated approval flow can be reviewed by clicking the **'Show Approval Flow'** button in the **'Approval Flow'** section below **'Attachments'** and above the **'Line Items'** section. If the PR is missing required information (i.e., the Accounting Information that must be completed in the **'Line Items'** section below, the approval flow will not be displayed).

Attachments

File Name ↑	Size	Creator	Visible to Supplier on Order
Sample Attachment.docx Download	14.4 KB	NCAS Requester	<input checked="" type="checkbox"/> Delete

[Add Attachment](#)

▼ Approval Flow

[Show Approval Flow](#)

▼ Line Items

2 Items Total [Show Details](#)

No. ↑	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1	<input checked="" type="checkbox"/>	4" Patty Press waxed paper dividers, 5,000 per	1	case	\$55.68000 USD		\$55.68000 USD		\$0.00000 USD	\$55.68000 USD
2	<input checked="" type="checkbox"/>	5" Patty Press waxed paper dividers, 5,000 per	1	case	\$61.44000 USD		\$61.44000 USD		\$0.00000 USD	\$61.44000 USD

Once all required information has been entered in the PR, the user can click the **'Show Approval Flow'** button to see the system generated approval flow.

17. The **'Line Items'** section is at the bottom of the **'Summary Page,'** and this is where the user can finalize all required details for the PR, most importantly, the financial information.
18. By default, line items will be displayed in ascending **'No.'** order on the left, but the user can rearrange the order in which they appear by clicking next to any of the other header fields: **'Type,'** **'Description,'** **'Qty,'** **'Unit,'** **'Price,'** **'Net Amount,'** **'Charges,'** **'Taxes,'** or **'Amount.'**

Note: Users can add additional fields to this view by clicking the **'Table Options Menu'** icon in the top-right. A dropdown menu will appear showing checkmarks next to the fields that currently display, but if the user clicks **'More...'** they can see other fields to add including **'Multi Year Indicator'** and **'Statewide Contract ID'** among others.

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▼ Line Items

2 Items Total

Show Details

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1	4"	Patty Press waxed paper dividers, 5,000 per	1	case	\$55.68000 USD		\$55.68000 USD		\$0.00000 USD	\$55.68000 USD
2	5"	Patty Press waxed paper dividers, 5,000 per	1	case	\$61.44000 USD		\$61.44000 USD		\$0.00000 USD	\$61.44000 USD

By default, line items are organized by the 'No.' header, but users can click on any other header fields in the gray box to organize by that field.

Click the 'Table Options Menu' to select the fields that appear on the header line of the 'Line Items' section.

20. Place a checkmark in the box beside the line item to edit. That line item will be highlighted in gray. Users can select multiple line items to edit at once (called a **'Mass Edit'** and all edits will be applied across all line items) by checking each box individually or by checking the box on the header level which will automatically select every line item for edit.

Note: Clicking on **'Show Details'** in the top right will display more line item information for each item. Alternatively, clicking **'Hide Details'** when this is expanded will return the view to a more limited scope. The only field that is editable at this level is the **'Qty'** field because this is a catalog item. Additional fields will be editable at this level for non-catalog line items.

2 Items Total

Hide Details

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1	4"	Patty Press waxed paper dividers, 5,000 per	1	case	\$55.68000 USD		\$55.68000 USD		\$0.00000 USD	\$55.68000 USD
2	5"	Patty Press waxed paper dividers, 5,000 per	1	case	\$61.44000 USD		\$61.44000 USD		\$0.00000 USD	\$61.44000 USD

The checkmark and gray highlight indicates the line item has been selected for edit. The only editable field at this point is 'Qty.'

The user clicked **'Show Details'** (which was replaced by **'Hide Details'** in this screenshot) to display more information about each line item.

Supplier Part #: PATTYPAPER4
Commodity Code: 481015 - Cooking and warming equipment
Contract: C459-V2
Supplier: THOMPSON & LITTLE, INC.
Location: THOMPSON & LITTLE, INC.
Terms of Payment: N30
Contract Type: Term Contract Statewide
Bid Number: 201900667: Kitchen Equipment & Accessor
Payment Basis: Receipt
Statewide Contract ID: 165A: Kitchen Equipment & Accessor
FOB Code: (NCAS) 001 - Destination freight paid

21. To initiate the edits, click the **'Actions'** button below the bottom item. A popup menu will display with the following options for the user to select.

- Copy Selected Items:** This will copy the selected line item and place the new version below the last line item.
- Edit Details:** The most commonly used selection when editing a line item. This will allow the user to view and edit the required accounting information.
- Edit Discount:** Disregard this option.

- d. **Edit Charges:** A popup screen will display, and the user can use this to enter special '**Shipping Charges**' or '**Other Costs**.' This should NOT take the place of shipping charges that are included in catalog items or for adding an additional service line item on a non-catalog order. This should be used in limited circumstances when an additional charge cannot be added to a PR with a catalog item on it to which a non-catalog item cannot be added.
- e. **Edit Taxes:** For State Agencies the tax rate always defaults to '**US-EXEMPT**,' but users can apply a tax rate if needed by selecting a rate from the popup menu.
- f. **Delete Selected Lines:** This will delete the selected line item.
- g. **Delete Discounts:** Disregard this option.
- h. **Delete Charges:** This option will delete any '**Charges**' the user manually added.
- i. **Delete Taxes:** This option will delete and '**Taxes**' the user manually added.

22. Click the '**Edit Details**' link in the popup menu.

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1		4\"	1	case	\$55.68000 USD		\$55.68000 USD			\$55.68000 USD
2		4\"	1	case	\$61.44000 USD		\$61.44000 USD	\$0.00000 USD		\$61.44000 USD

A context menu is open for the second item, showing options: Copy Selected Lines, Edit Details, Edit Discount, Edit Charges, Edit Taxes, Delete Selected Lines, Delete Discounts, Delete Charges, and Delete Taxes. The 'Edit Details' option is highlighted with a dashed circle. A yellow callout box points to this option with the text: 'Click **Edit Details** to edit all selected line items.'

Buttons at the bottom: Continue Shopping, Delete, Save, Submit.

23. The '**Line Item Details**' page is displayed. All details related to this line item are shown on this page, where users can also update necessary information about the line item.

Note: The fields that can be edited by a user are determined by the line item type being edited (non-catalog, catalog, or punchout). As a rule, more fields are editable for non-catalog orders than are editable for catalog orders.

23. Scroll down the page to the '**Accounting – by Line Item**' section. If the user does not have any of these fields defaulted in their profile, the system will prompt the user to fill these in with a notification at the top of the screen and red outlines surrounding the fields with missing information. '**Company**,' '**Account**,' and '**Cost Center**' are all required fields that must be completed in order to '**Submit**' the PR.

24. **Bill To:** Defaults from the user's profile but can be modified using the drop-down menu. The Bill To code selected will determine the Bill To address that is printed on the line item. The invoice will be delivered to the specified address.

25. **Company:** Defines a unique fund type within a reporting entity.

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26. **Account:** Defines the purpose of the expenditure.

27. **Center:** Defines the type of expenditures made by an individual cost center.

Note: The **'Company,' 'Account,'** and **'Cost Center'** fields are generated to ensure only valid NCAS general ledger accounting combinations are selected in the dropdowns. The values in these fields must match a valid accounting combination. The system will not prevent a user from selecting an invalid combination in the dropdowns, but an error message will immediately display if the combination is not valid. If the selected accounting combination is not valid, users may have to back out all information from subsequent fields by selecting **'(no value)'** from the **'Search more'** menu. For example, to update the **'Company'** field users may have to set the **'Account'** and **'Center'** fields to **'(no value)'** first.

21. **Project Company:** Defines a unique fund type within a reporting entity for a purchase order that requires funds to be encumbered over multiple years.

22. **Project Code:** Use the drop-down menu to select the appropriate project code.

23. **Multi Year Indicator:** Defines the fiscal year for which the funds on this eRequisition should be encumbered. This is a dropdown field that defaults to **'Unspecified,'** but the user can select future fiscal years from the dropdown should that be necessary.

24. **Item Classification:** Set by commodity code and cannot be changed. A 'good' commodity code will set the Item Classification to **'Good'** and a 'service' commodity code will set the Item Classification to **'Service.'**

25. **Federal Award Number:** Select the applicable Federal Award Number from the drop-down menu or select **'Search more'** to view a complete list of federal award numbers if applicable to the purchase.

26. **Government Grant ID:** This field is only present in when certain accounting combinations are selected. It is a free text field where the user can enter in the details of any State grants awarded to their organization if applicable to the purchase.

Accounting - by Line Item

There are 3 problems that require completion or correction in order to complete your request. Mouse over the red icons to learn more. Use the *Next* and *Previous* links to step through the errors as needed.

Bill To: * LAP

Company: * (no value)

Account: * (no value)

Cost Center: * (no value)

Project Company: (no value)

Project Code: (no value)

Multi Year Indicator: Unspecified

Item Classification: Good

Federal Award Number: (no value)

'Company,' 'Account,' and 'Cost Center' are all required fields that compose the accounting combination. The system will indicate they must be entered in a valid combination with red borders surrounding the dropdown fields and an error message at the top of the screen. Both will disappear once the information has been correctly entered.

27. The **'Shipping – by Line Item'** section will display three fields that were previously set on the header level for the entire PR, **'Ship To,' 'Deliver To,'** and **'Need-by Date.'** Edits made at the line item level will remain in place even if the user changes an overall setting on the **'Summary'** page.

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28. The **'Charges – By Line Item'** will allow the user to enter special **'Shipping Charges'** or **'Other Costs.'** Click **'Add'** and from the popup menu select the **'Charge Type,'** (Shipping or Other), whether the charge should be applied as a dollar **'Amount'** or **'Percentage,'** then select that value and click **'Apply.'**

29. The **'Taxes – by Line Item'** section will default to **'US-EXEMPT'** and thereby apply no tax on any items. If taxes need to be added for any reason, click the **'Tax Code'** dropdown, select **'Search more,'** and select the applicable tax rate. The system will automatically calculate the dollar amount to be charged.
30. **'Comments'** and **'Attachments'** can be added at the line item level, but it is strongly suggested that they only be added at the header level on the **'Summary'** page. That makes it easier for all other users and the supplier to see any important comments or attachments.
31. When all necessary edits have been made, click the blue **'OK'** button at the top or bottom of the **'Line Item Details'** page to apply those changes and return to the **'Summary'** page.

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32. Back on the **'Summary'** page, please note three additional buttons next to the **'Actions'** button below the line items. The **'More'** and **'Import Accounting'** buttons should be ignored. The user can click the **'Update Total'** button if they make changes to any editable fields (i.e., **'Qty'**) in this view of the line items above and want the system to recalculate the **'Amount.'**
33. Since all requisite information has been entered for all line items, the **'Approval Flow'** is now visible above the **'Line Items'** section. Users can manually add additional approvers by clicking between existing approvers and selecting the desired approver from the dropdown.

Note: The first object shown in the approval flow will always be **'NC Budget Integration'** (unless the user selects **'Yes'** for **'Pass to Budget Officer'**). This is a system-generated approval group that exists to check for pre-encumbrance with NCAS. If sufficient funding exists, this automated approver will take no action and the PR will immediately transfer to the next approver listed, in this case **'NCAS Supervisor.'** If the PR fails the pre-encumbrance check, the PR will go to **'Denied'** status and the user will have to click **'Withdraw'** then **'Edit,'** to make the necessary changes so that it can be reevaluated. This will be recorded in the **'History'** tab, as well as an auto-generated comment.

Approval Flow

Submitted → Pending (NC Budget Integration) → Pending (NCAS Supervisor) → Pending (ADMIN Budget Approver) → Pending (ADMIN Purchasing Agent) → Watcher (ADMIN Chief Procurement Officer) → Approved

Line Items

2 Items Total

No.	Qty	Unit	Price
1	1	case	\$55.68000 USD
2	1	case	\$61.44000 USD

Annotations:

- Users should ignore the **'More'** and **'Import Accounting'** buttons but can click **'Update Total'** if there is a need to recalculate the **'Amount.'**
- The **'NC Budget Integration'** approval group will always be the first group and it exists to check for pre-encumbrance of funds. Users can add manual approvers by clicking the arrows between existing

34. At that top of the **'Summary'** page, the **'Cart Summary'** will provide a quick glimpse at the total dollar value and supplier included on the PR. The user should ignore the **'Check'** button within this summary.
35. Just above the **'Cart Summary,'** the user will have the option to print the PR by clicking the **'Print'** link. They can also return to the **'Catalog'** tab within the same shopping cart by clicking **'Continue Shopping.'** The PR can be deleted via the **'Delete'** button, or it can be saved to complete later by clicking the **'Save'** button.
36. When all required information has been entered and verified for accuracy, the user should click the **'Submit'** button to send the PR to be approved by the approval flow.

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STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

PR11818887: Sample Expert View PR

Summary

Title: * Sample Expert View PR

Entity: 13 - Department of Administration

On Behalf Of: NCAS Requester

Delay Purchase Until:

Suppress Order: ☐

Buying Entity: 13EG

Click 'Print' to see the printed version of the PR and click 'Submit' to send the PR off for approval.

Print Continue Shopping Delete Save Submit

Cart Summary

THOMPSON & LITT... (2)	\$117.12000 USD
Taxes	\$0.00000 USD
Total (2 items)	\$117.12000 USD

Check

37. If the PR submitted successfully, an option to attach an additional comment to the PR will appear. Clicking 'OK' will officially submit the order, and the user will see the status reflected as 'Submitted' in their 'My Documents' portlet on the 'Procurement' tab.

Submit - Comments

Enter comments about the request you are submitting for approval.

You chose to submit PR11818887.

Comments:

☐ Visible to Supplier

There is an option to include additional comments, and the user should click 'OK' to officially submit the PR.

OK Cancel